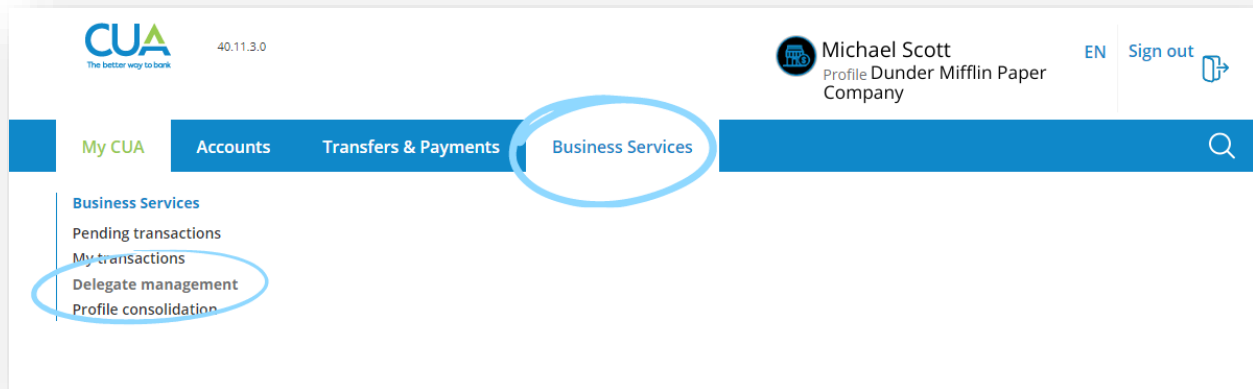


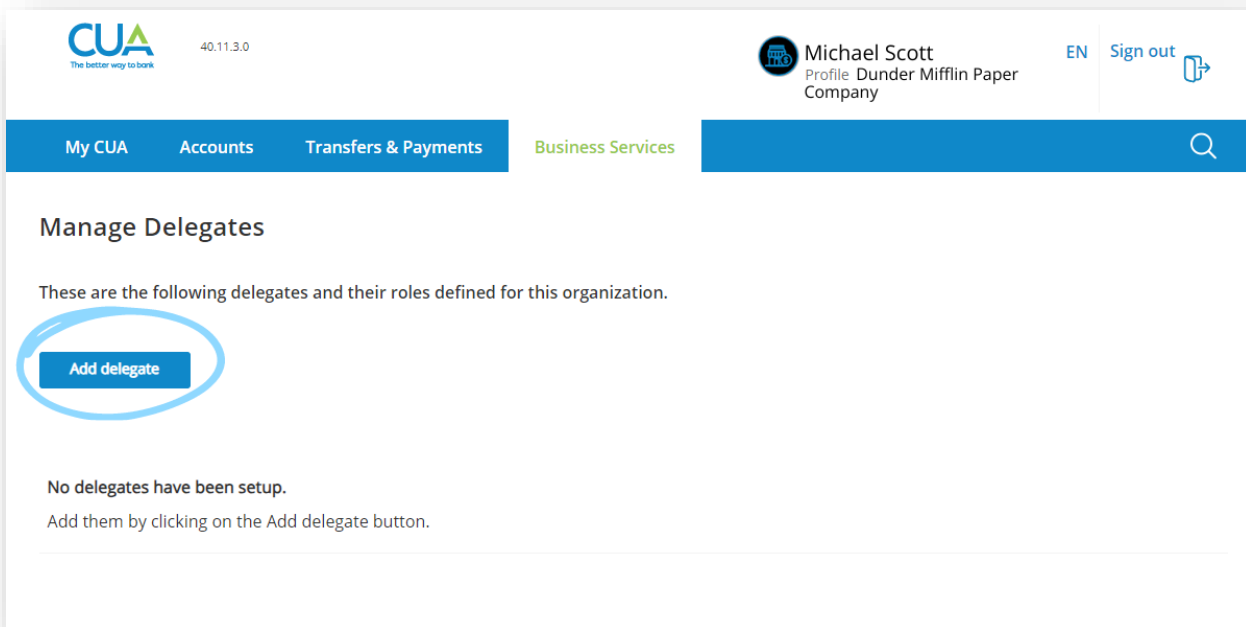
MEMBER INSTRUCTION GUIDE

GUIDE 19: ADDING DELEGATES (BUSINESS MEMBERS)

1. Once you've set up your new online banking profile, you can begin accessing business services. To add delegates, hover your mouse over the 'Business Services' tab along the main menu. Select 'Delegate management' from the dropdown menu.



2. From the 'Manage Delegates' page, select 'Add delegate'.



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Michael Scott
Profile: Dunder Mifflin Paper Company

EN Sign out

My CUA Accounts Transfers & Payments Business Services

Manage Delegates

These are the following delegates and their roles defined for this organization.

[Add delegate](#)

No delegates have been setup.
Add them by clicking on the Add delegate button.

- From the 'Add Delegate' page, you will be required to **1)** select a username for the new delegate. Next, **2)** enter the delegate's name and **3)** indicate their access level. Then, **4)** select which method should be used to send their temporary password and **5)** enter (and re-enter) the delegate's email and **6)** phone number details. **7)** Read and select the box agreeing to the consent statement. **8)** Select 'Continue'.

Note: The delegate will use the username you created to login to online and mobile banking.

The screenshot shows the 'Add Delegate' form in a web application. The form is titled 'Add Delegate' and has three tabs: 'Details', 'Confirm', and 'Completed'. Below the title, there is a note: 'Your confirmed personal mobile phone number and e-mail will be used to send authentication codes necessary to add a delegate to your business/organization profile.' The form is divided into sections: 'Delegate details' and 'Delegate notes (optional)'. The 'Delegate details' section contains several fields and options, each highlighted with a blue circle and a number:

- 1)** Delegate username: A text input field with the placeholder 'Enter delegate username'. Below it, a note states: 'The username should be between 5-34 alphanumeric characters. Periods, dashes, underscores and @signs are also allowed. The username should be communicated to the delegate separately.'
- 2)** Delegate name: A text input field with the placeholder 'Enter delegate name'.
- 3)** Access level: Two radio buttons, 'Read-only' (selected) and 'Initiator'.
- 4)** Send password: Two radio buttons, 'E-mail' (selected) and 'Mobile phone'. Below this is a link: 'View access level comparison table'.
- 5)** E-mail: A text input field with the placeholder 'Enter e-mail'.
- Re-enter e-mail: A text input field with the placeholder 'Re-enter e-mail'.
- 6)** Mobile phone: A dropdown menu showing 'Canada +1' and a checkmark. Below it is a text input field with the placeholder 'Enter mobile phone number'.
- Re-enter mobile phone: A text input field with the placeholder 'Re-enter mobile phone number'.
- 7)** Delegate notes (optional): A large text area.
- 7)** Consent statement: A checkbox followed by the text: 'I confirm that I have obtained consent from the delegate named above for the collection, use and disclosure of the delegate's phone number and/or e-mail, as applicable, in connection with this sign in notification.'
- 8)** Continue: A green button with the text 'Continue'.

At the bottom of the form, there are two buttons: 'Cancel' and 'Continue'.

- Next you will be asked to confirm your new delegate's details. If the information appears correct, select 'Continue'. If the information is incorrect, you can select the 'back' button to edit the details.

The screenshot shows the CUA online banking interface. At the top left is the CUA logo with the tagline 'The better way to bank' and version number '40.11.3.0'. At the top right, the user's name 'Michael Scott' and profile 'Dunder Mifflin Paper Company' are displayed, along with 'EN' and a 'Sign out' button. A navigation bar contains 'My CUA', 'Accounts', 'Transfers & Payments', 'Business Services', and a search icon. The main heading is 'Add Delegate' with sub-tabs for 'Details', 'Confirm', and 'Completed'. A message box says 'Confirm delegate details.' Below this is a table of delegate details:

Delegate username	StanleyHudson
Delegate name	Stanley Hudson
Access level	Read-only
Send password	E-mail
E-mail	stanleyhudson@dundermifflin.com
Mobile phone	1 (902) 123-4567

At the bottom, there are three buttons: 'Cancel', 'Back', and 'Continue'. The 'Continue' button is highlighted with a blue circle.

- To authenticate this transaction, a one-time code will be sent to the mobile number or email associated with *your* online banking profile. Once you receive the code, enter it in the box and select 'Continue'.

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EN Sign out

My CUA Accounts Transfers & Payments Business Services

Add Delegate

Details Confirm Completed

! This transaction requires authentication.

Confirmation code

⌵ E-mail

⌵ Text message

A text message with the authentication code has been sent to your phone XXX.XXX.X345. Enter in the code you have received.

Enter code

If you don't receive the text message within 10 minutes, [resend the code](#).

Cancel Back Continue

6. You have successfully added a delegate to your account.

Continue to step 7. for information regarding your new delegates.

Note: You can choose to print or save a copy of this transaction for your records before proceeding to the next step.

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EN Sign out

My CUA Accounts Transfers & Payments Business Services

Add Delegate

Details Confirm **Completed**

Delegate successfully added.
A temporary password has been sent to the delegate.
The username should be communicated to the delegate separately.

Print Export Navigate to

Delegate details

Delegate username	StanleyHudson
Delegate name	Stanley Hudson
Access level	Read-only
Send password	E-mail
E-mail	stanleyhudson@dundermifflin.com
Mobile phone	1 (902) 123-4567

7. After successfully adding a delegate to online banking, a notification from CUA will be sent to your delegate containing a temporary password. Your delegate can use this password and the username you created in step 3 to log in to your account.

Upon logging in, an authentication code will be sent to the mobile number or email associated with *their* delegate profile. They will be required to **1)** enter the authentication code, and **2)** create a new password. Once the password has been entered (and re-entered), they can **3)** select 'Proceed to sign in'.

The screenshot shows a web form titled "Create New Password". At the top, there are two radio button options: "E-mail" (selected) and "Text message". Below these is a text input field. A blue circle labeled "1)" highlights the text: "A text message with the authentication code has been sent to your phone XXX.XXX.X363. Enter in the code you have received." Below this text is an input field labeled "Enter code". A link "resend the code" is visible below the input field. Below the "Text message" section, a blue circle labeled "2)" highlights the "New password" section, which includes an input field labeled "Enter new password". Below this input field is a "Password strength: Weak" indicator and a list of requirements, each with a red 'x' icon: "Minimum 10 characters", "Minimum 1 uppercase letter", "Minimum 1 lowercase letter", and "Minimum 1 number". Below the requirements is an input field labeled "Re-enter new password". A blue circle labeled "3)" highlights the "Proceed to sign in" button at the bottom of the form.

8. Your delegate now has controlled access to your account.

Note: You can edit delegate information or revoke privileges at any time through the Delegate Management section of online banking.

